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ABSTRACT

Limited to periodical literature, this annotated bibliography on school finance contains 81 references grouped in 5 categories: (1) policy and politica issues, (2) federal government, (3) state issues, (4) aid to nonpublic schools, and (5) accountability. Following the bibliographic citations, annotations range from 4 to 15 lines and conclude by listing the number of references included in the article. The earliest citation noted is from 1972. Articles from "Phi Delta Kappan" are frequently cited; for example, of the 26 articles cited in the first category--policy and political issues--16 are from "Phi Delta Kappan." Among other periodicals frequently cited are: "The American School Board Journal," "Today's Education," "National Association of Secondary School Principals Bulletin," and "Educational Leadership." (MLF)

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ANNOTATED BIBLIOGRAPHY ON SCHOOL FINANCE: POLICY AND POLITICAL ISSUES; FEDERAL GOVERNMENT; STATE ISSUES; NON-PUBLIC SCHOOLS; ACCOUNTABILITY

by

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EA 018 118

Policy and Political Issues

Brown, Oliver. "Pages and Pages on How to Cut School Costs - Wisely." The American School Board Journal, October 1978, Vol. 165, pp. 32-36.

With the short fall of financing in future years, the author outlines two possible plans. One plan deals on a short range plan. The author categorizes the school system into five areas. The five areas include organizational units, functions, funds, programs, and objects or line items. The author provides a list of cost cutting items as a result of the school budget cutting process. There are both short run proposals and long range proposals suggested. The school budget cutting process includes five steps: (1) appoint a manager, set a goal and pad it, clarify educational priorities; (2) identify alternatives; (3) determine opportunities for cost reductions; (4) report to the school board; and, (5) present level of services. (0 references)

Clark, David L., Amoit, Mary Anne. "The Impact of the Reagan Administration on Federal Education Policy." Phi Delta Kappan, December 1981, pp. 258-262.

The five policy demands of the Reagan Administration for education are: diminution, deregulation, decentralization, disestablishment, and deemphasis. The authors predict that education will decline continually in importance on the political scale nationally. (14 references)

Coleman, James S. "Changing the Environment for Youth." Phi Delta Kappan, January 1978, pp. 318-319.

Youth alienation is a result of a decrease in the adequacy of the environment in which youth are finding themselves. The several desirable school changes recommended to help lead to more personalized schools. School changes include: less reliance on technology; fewer ties to typical urban and suburban patterns; lower economic cost; less rationality and individualism; and more opposition to the current status quo in education. The emphasis in the family structure should be on children.

Cronin, Joseph M. "The Federal Takeover: Should the Junior Partner Run the Firm?" Phi Delta Kappan, April 1976, 57, pp. 499-501.

Federal spending increases for education have caused an increase of regulations of local school districts. Federal control has affected non-federal agencies like The Education Commission of the States, state education departments, state boards of education, and private foundations. The author that federal intervention is not necessary and suggested that there be widespread protests against federal intervention from local and state education advocates. Commendations should be given to congressmen who fight detailed federal specifications, consolidation and elimination of overlapping program categories. (0 references)

Doyle, Denis P. "Deregulation, The New Federalism, and Scarcity: The End of Additive Reform." Phi Delta Kappan, September 1982, pp. 54-56.

The aims of deregulation in education are to provide administrative savings and to give the states the responsibility for education. As a result of deregulation, the following events occurred: 1) The Lau regulations were withdrawn with new regulations still needed; 2) the Education Consolidation and Improvement Act (ECIA) of 1981, which consolidated grants programs into a block grant; and, 3) the Tax-Exempt status which has been rescinded by the President. Some effects of these deregulations are the virtual elimination of federal funding and the possible elimination of the Education Department. (3 references)

"Public Policy and Private Education." Phi Delta Kappan, September 1980, 62, 16-19.

A need exists for research to be conducted on why middle class parents prefer to send their children to private schools. The public schools must be willing to take on the desirable qualities of the private schools. Seven reasons listed to support the fact that private schools are flourishing are: (1) academic and non-academic standards of accomplishment; (2) professional integrity and independence for the staff; (3) a decent and physically safe environment for students and teachers; (4) manageable size in terms of both the school building and the school system; a substantive program that satisfies the interests of staff, students, and parents; moral instruction; and, mutually satisfactory peer-group contacts. There are certain activities public schools can not and should not do; religious instruction, for example, is properly the province of the church. (5 references)

"Your meager slice of New Federalism could contain delicious options for schools." The American School Board Journal, 1982, Vol. 169, pp. 23-25

For the first time in 20 years, there is the threat of total federal withdrawal from school funding programs. The federal government is looking for a way to cut costs, and they feel that public school systems are in disarray; therefore, cutting money here would be a good start. Unfortunately, the only place to get money would be the state. Proposition 13 was to be an answer to this dilemma. This was to have schools under local control with statewide funding. If schools are to survive, two general wrong assumptions must die. First, public and private schools can exist and help fill voids that the other cannot fill. Second, teacher unions are detrimental to public school funding. Because they force the administration to bargain rationally. (0 references)

Flygare, Thomas J. "Bakke: Implications for Federal Affirmative Action." Phi Delta Kappan, February 1978, 59, pp. 418-419.

The Bakke case decision is discussed. The victory of Bakke does not end the federal affirmative action requirements for colleges and universities. The affirmative action as practiced by the medical school University of California, and the affirmative action required by federal regulations are not the same. The major difference is the special admissions program at Davis as compared to federal affirmative action requirements. (8 references)

Guthrie, James W., "Funding an 'Adequate' Education." Phi Delta Kappan, March, 1983, pp. 471-476.

Society in the United States has relied on the political process and the action of the marketplace to define adequacy in education. The belief that neither has proved to be entirely satisfactory is strongly suggested. A balance between public interests and private preferences is proposed. In defining adequacy politically, four strategies have evolved: specifying adequate resources; adequate processes; adequate content; and, adequate outcomes. In defining adequacy in the marketplace, three major plans have evolved including unregulated vouchers, compensatory vouchers, and private interests. Each of these plans involves public financial support but private provision of school services; they differ primarily in the degree of government regulation. (0 references)

Irgang, Alan and Gelber, Leonard, Saving Money By Improving School Management. National Association of Secondary Principals Bulletin Bulletin, September 1981, Vol. 65, 101-108.

With a declining school budget, limited resources, and a demand for improved student achievement, the authors list cost saving ideas that would direct more resources to instruction. Recommendations presented may be satisfactorily employed with varied results from school to school. Assigning personnel in accordance with school needs, delegate persons to keep track of misuse, legitimate use, and repairs of machines and equipment, and monitor the use of the telephone and printing are a few of the cost saving ideas discussed. (0 references)

James, Tom. "Teachers, State Politics, and the Making of Educational Policy." Phi Delta Kappan, October 1976, v58, pp. 165-168.

Teachers are now becoming a significant influence in the molding of educational policy. The political strength of teachers is growing rapidly. Teacher organizations must know the educational needs of the state and seek goals for its members. This article discusses the goals of education and getting into the "political limelight" with the support of the public and educators. (0 references)

Johnson, Christopher. "Our Investment In Public Education." Today's Education, February-March 1982, pp. 15-17.

The amount of dollars that are spent to educate youth pays off far more than it costs to support youth on welfare and incarceration. The crisis that public education faces is great, 'lets abandon the system altogether,' because it fails to get the job done, has been the general attitude of the public. Investing money in the development of literacy skill produces about six dollars in national income, where as investing in social welfare and incarceration do not develop any skill. It pays less to invest in public education for youths. (0 references)

Jordan, K. Forbis, and Hanes, Carol E. "Financing Education In An ERA of Limits." Phi Delta Kappan, June 1976, 57, 677-681.

State legislatures are being affected in the area of school funding legislation because of the realization that natural and economic resources are now scarce. The recession has not allowed for the fiscal reform of shifting from local to state sources of funding. The rising inflation along with state aid cutbacks has caused schools to cutback on their educational programs and services. The educational policy decisions are being directed by the taxpayer groups who advocate fiscal retrenchment. Because of ceilings on local revenues and expenditures, the possibility that local funding sources can compensate for decreased state aid has been eliminated. Schools are denied access to local funding resources, since the state insists on uniform spending, and the state also fails to provide adequate funding from the state level. Two possible solutions are suggested : (1) tailoring the educational program to meet state revenues requiring state and local sources to provide for an adequate educational program. (13 references)

Kaplan, George R. "Some Cranky Fulminations on Reagan and Education." Phi Delta Kappan, May 1982, 592-595.

The Reagan administration is tearing down the efforts of the past fifty years. The state departments are not capable of demonstrating leadership in the absence of a federal role. The author anticipates that educational research, special concerns, and quality of education will soon be abandoned. (0 references)

Leonard, Mary. "Reaganomics and K-12 Education: Some Responses from the Private Sector." Phi Delta Kappan, 1982, pp. 600-602.

Federal tax cuts are resulting in less actual giving from more affluent individuals since it actually results in more out of pocket money. As a result of this, schools will have to become more adept at applying for and securing federal grant and private grant money. This may include actual training of students by corporate employees. Unfortunately, there is not enough money to replace the lost federal money from the private sector. (0 references)

Nolte, Chester M. "The Crucial Questions School Board Members Must Answer - Or have Answered For Them." The American School Board Journal, Vol. 165, pp. 20-22.

School boards are called upon to justify their decisions more frequently than in the past. The conflict between states and their interest of education for their youth and the legal interests of the individual for fair and equitable treatment are the forces on today's schools. Because of these conflicts, eight areas of questions need to be addressed. The eight areas include: accountability, collective bargaining, curriculum, finance, governance, liability, personnel, and student rights. (0 references)

Pompeo, Joe. "Four-Day School Weeks Can Work," The American School Board Journal, November 1981, Vol. 168, p. 37.

Cimarron School District in northeastern New Mexico with the approval of the State Legislature, began an experimental program in 1973, shortening the school week to four days and lengthening the school day. The school board feels they made a wise decision because they were running out of funds when fuel took the large jump in price at the time of the oil embargo. They found that the majority of teachers, students and parents approved of the shortened week. Academically there was apparently no harm done to the programs. The school district was permitted through several acts of the state legislature to continue this program to the present. In 1979 the state made it possible for all local school districts in New Mexico to adopt alternative scheduling with the approval of the State Department of Education before it was implemented. (0 references)

Richburg, Robert W. and Sjogren, Douglas D. "The Four-Day School Week." Phi Delta Kappan, 1982, pp. 622-625.

A pilot program in Colorado was undertaken to identify the feasibility of a four-day school week. The primary intent was to decrease fuel consumption, but longer days provided equal contact time with the students. It was found that academic achievement scores did not significantly differ using the four day weeks. Pupil acceptance of the shortened week ran high (93%). The students used the extra day to work at home or at a job. The resulting energy savings ranged from 7-25%. Gas consumption decreased 22.5% and maintenance costs decreased 18%. Teacher acceptance also ran high (95%) with a decrease in the amount of teacher absences. (2 references)

Rodgers, Joseph A. "Public Policy and Private Education - A Rebuttal." Phi Delta Kappan, May 1981, pp. 666-667.

The author attacks Denis Doyle's article on private education. Rodgers argues that parents choose schools on the basis of the quality of their programs. He also states that high quality education is not the sole property of either private or public schools. Rodgers attacks Doyle's seven points and stated he had an unrealistic view of private education. (0 references)

Ryor, John. "One-Third Federal Funding." Today's Education, March-April 1977, p. 6.

The federal government needs to make a financial commitment on the national level to public education. Federal financing should be increased from one-fourteenth spending to one-third federal financing. The solution to public education finance crisis is for the federal government to pick up its fair share of the tab for preserving and improving the public schools. Restructuring the tax system and increasing local property tax would not be enough to help. (0 references)

Shalala, Donna E. and Williams, Mary Frase. State Tax Politics, The Voters, and School Finance Reform, Phi Delta Kappan, September 1974, pp. 10-13.

In 1972 and 1973, seven constitutional amendments to eliminate property tax were defeated. These amendments if passed could have had disastrous results on the educational system. There was no clear alternative tax found to subsidize the decrease in revenue. More wealthy patrons are hesitant to do away with taxes which are regressive in exchange for progressive taxes. In turn, it was evidenced that voters were not willing to switch from one form of taxation to another when questionable results were expected. Voters also were unwilling to eliminate property taxes if a viable alternative was not available. (6 references)

Shannon, Thomas A. "The Emerging Role of the Federal Government in Public Education." Phi Delta Kappan, 1982, pp. 595-597.

Since the beginning of President Reagan's term of office, there has been an increasing trend to less government intervention in school funding. Certain functions of the school were identified. These included: (1) Leadership on a national scale; (2) evaluating and gathering data on educational trends; (3) decreasing gross national educational deficiencies; (4) guaranteeing equal rights and opportunities; (5) functioning as a national research and resource deapartment. Reagan has proposed a decrease in presidential involvement which will only increase input from congressional and judicial sources. Unfortunately, a decrease in the amount of money put into education will not be evident until the turn of the century, and then it will be too late to rectify the situation. (0 references)

Shaw, Paul C., and Funderburk, Charles. "Teachers' Political Attitudes: Alienation, Dogmatism, and Commitment to Democratic Values." Urban Education, January 1976, Vol.10, pp. 366-378.

The political socialization of students is greatly influenced by the attitudes of the teachers who influence young people. A study was done on the political attitudes of urban and rural elementary and secondary teachers in Pennsylvania. The urban teachers sample was taken from Pittsburgh's two groups of teachers, i.e. teachers with experience in "typical black ghetto schools," and teachers with experience in "typical schools of white suburbia." The rural sample was taken from a random selection of elementary and secondary teachers in five counties. Three attitudes were measured which were alienation, dogmatism, and commitment to democratic values. The results of the survey indicated that as a group, teachers do not feel alienated, and had generally low dogmatism scores, even though rural teachers had higher dogmatic scores than those of urban teachers. The teachers rated high on commitment to democratic values and moderate support to free speech and procedure. The study concluded that teachers generally hold attitudes supporting social order, they hold uniform attitudes, and the anti-establishment attitudes held by youth are not a result created by teacher models. (12 references)

Webb, Harold V. "Our Friends' - More Than Our Enemies - Are Destroying Local Control of Education." The American School Board Journal, August 1976, 163, pp. 32-33, 35.

The possible demise of liberty and freedom were discussed. The author focused on the local school as our last bit of control and how the states have requested funding be channeled through the treasury first, then to the local school districts. When all is almost lost, we American people will rise up and claim our heritage and demand local control. (8 references)

Weckstein, Paul. "Democratic Economic Is The Key To Future Quality Education." Phi Delta Kappan, February 1983, pp. 420-423.

Due to the decline in the economy and funds available for education, education advocates should join with others to work for a common community based agenda for democratic economic development. Different types of revenue sources from corporations and the wealthy individuals could both ease social service funding problems and allow for property tax relief for low and middle income citizens. The internal practices of the school, testing, vocational education, and school discipline, have also been affected by the economy. An attempt must be made to look at the economic issues threatening basic values and find alternative means for promoting economic growth as it relates to education. (0 references)

Wirt, Frederick M. "What State Laws Say About Local Control." Phi Delta Kappan, April 1978, pp. 517-519.

Early school reformers successfully centralized state control over local districts. For today's movers and shakers, systematic reform will come only from victory in the state or federal arena. Wirt concluded that "Local Control" may still be a rallying symbol for such reform. However, the reality of modern public education is not portrayed. (0 references)

Federal Government

Berke, Joel S. and Moore, Mary T. "A Developmental View of the Current Federal Government Role in Elementary and Secondary Education," Phi Delta Kappan, January, 1982, 333-337.

Education and Consolidation and Improvement Act of 1981 indicated the new direction of federal regulation policy--reduction in detailed regulation and federal support of existing programs. The 60s encouraged states to pursue national objectives, such as teaching minorities, poor, handicapped, etc., and with a limited number of rules and regulations. By the 70s the restrictions and regulations had become very complicated and compliance with federal intent was difficult and expensive. The government used 8 percent of federal support to control 92 percent of state and local funding. (18 references)

Feldstein, Martin. "The Effect of a Differential Add-On Grant: Title I and Local Education Spending." Journal of Human Resources, Fall 1978, Vol. 13, pp. 443-58.

The study measured the effectiveness of one add-on grant, the federal government's program to increase local educational spending on pupils from low-income families. The estimates presented in the study indicate that local school districts increase their spending by a substantial fraction of the funds that they receive through the Title I program. These estimates imply that this aid is quite effective and therefore suggests that the traditional theory of intergovernmental aid should be extended to recognize the type of grant. (5 references)

Frohlicher, Jean S., and Jennings, John F. "The Federal Approach to Education: What Happens After the November Elections?" Phi Delta Kappan, October 1976, pp. 179-180.

Congress is concerned with making the schools better for the students by improving current programs. The issues discussed were: categorical vs. block grants, paperwork vs. accountability, and intervention vs. protection of rights. (0 references)

Gibson, Raymond C. "Block Grants for Higher Education." Phi Delta Kappan, October 1972, pp. 118-119.

The author has researched problems of university support and control in four major regions of the world and has found that, of all the university systems in advanced areas of the world, the U.S. system has lost the most in autonomy and freedom during the past 25 years because of categorical grants from the federal government. A brief review of the financing of higher education in other countries is presented. The author stated that research involving every continent indicated four basic problem areas common to all universities. The areas of purpose, organization, finance, and evaluation are discussed in detail. (0 references)

Halperin, Samuel. "ESEA: Decennial Views of the Revolution (The Positive Side)." Phi Delta Kappan, 1975, 57, pp. 147-151.

When ESEA was enacted originally, its monetary input into the school system was very limited. ESEA only contributed from 3-7 percent of the schools operating expenses. ESEA spotlighted the needs of the children by emphasizing the many needs and inequities of poor school systems. The act fueled other appropriations and led the way for other federal education funding programs. By its structure, ESEA brought together both public and private schools to coalesce the public and private schools because it funded both sectors. The act also promoted accountability due to the necessity of answering to the state for any money received. (7 references)

Hollings, Ernest F. "The Case Against Tuition Tax Credits." Phi Delta Kappan, December 1978, v60, pp.277-279.

The author states that the government's duty is to provide for the public schools. The tuition tax credits is bad policy and unconstitutional as referred to in the article. This article attempts to describe the pro and con of the tuition tax credits. The author believes that public education is the best investment a nation can make. (0 references)

Levin, Dan. "The New Federalism: Here's How It Works In Canada." The American School Board Journal, April 1982, 26.

Unlike the United States, Canada does not have any federal education agency. The funding and the operation of their schools comes from provincial ministries of education. The United States school system relies on some federal support from the government. The Reagan Administration is making every effort to increase the amount of funding that would come from individual states to fund public education. Since Canada schools are being operated locally and funding is already coming from the local government, the United States Educators might benefit from a thorough look at Canadian Educational System. (0 references)

Murphy, Joseph F. "Block Grants Will Cut the Strings on Federal Money." The American School Board Journal, September 1981, 35.

Presented here is a brief review of the major arguments in favor of block grants. Included is a brief history of federal grants in education. The five most frequent arguments offered by block grant proponents are discussed. They include: (1) local control; (2) federalism; (3) complexity and fragmentation; (4) fiscal considerations; and (5) equity considerations. (0 references)

O'Boyle, Hohn R. "A Systematic Means of Federal Support for Education." Education, Spring 1982, Vol. 102, pp. 315-319.

Direct payment of teachers salaries by the federal government is one means of achieving uniform financial support of education, local tax relief, resolution of many professional problems and improvements of quality instruction and instructors. No change is proposed in local control of hiring, firing, seniority, tenure, or merit practices. The entire proposal is intended to provide stability and dignity to the teaching profession and through them to the field of education. (0 references)

Orlich, Donald, "Federal Education Policy: The Paradox of Innovation and Centralization." Educational Researcher, Vol. 8, pp. 4-9.

The U. S. federal educational research and development policy has been to generate a paradox of local innovation accompanied by centralization of control. Current policies will not prepare better or kinder, more intelligent human beings. What is needed are creative and tested educational innovations which can stand the test, the rigorous experiment, not political contests. The authors stated that modern schools have evolved into a congressional instrumentality for social, economic, and political change-all under the rubric of "education". Thirteen rules are suggested by the author to lead to the successful implementation of any worthwhile innovation. The belief that even with a massive effort by ERIC to disseminate information about educational innovations, the problem of how to make users in the public schools aware of educational innovations still persists as one of the major barriers to change is espoused. (42 references)

Packwood, Robert, and Hollings, Ernest. "The Case for Tuition Tax Credits/ The Case Against Tuition Tax credits." National Association of Secondary Principals Bulletin Bulletin, October 1981, pp. 76-83.

A tuition tax credit debate by Republican Senator Bob Packwood and Democratic Senator Ernest Hollings. Senator Packwood takes the side for tuition tax credits and Senator Hollings expounds on the case against tuition tax credits. Senator Packwood states that the Tuition Tax Relief Act of 1981 would help the American people keep the dream of education for themselves and their children alive, not on the terms of the federal government, but on their independent, individual efforts. Senator Hollings feels that in these uncertain economic times when virtually every program in the federal government has been either cut or terminated, this scheme carries and even more difficult burden. He states that even in the best of economic times, this proposal is unwarranted and in the present difficult economic times, it is unconscionable. The constitutionality of tuition tax credits is also discussed.
(0 references)

Pinkney, H. B. "An American Dilemma: Financing Public Education." National Association of Secondary Principals Bulletin Bulletin, November 1980, pp. 68-73.

The author stated that the current system of financing public education is "unjust and unequal". If we are really concerned about the future, the urgency now exists to put our priorities in rank order. The author called for the federal government to increase its financial support for education (1) provide adequate funds for the support of public education and "pay now" as students, or (2) to prepare ourselves to "pay later" as adults with compounded interest through other social agencies for their support. Financing education is looked upon as a crucial issue and the local property tax can no longer be depended upon to carry a lion's share of financial support. Solutions to this problem are suggested. They are: (1) deteriorating tax base; (2) full state funding; (3) increased federal aid; (4) increased funding vs. improved program; and, (5) accountability. (5 references)

Shannon, Thomas A. "The Emerging Role of the Federal Government in Public Education," Phi Delta Kappan, May 1982, 592-594.

The current role of the federal government in education is the product of 60 years of legislation. Four areas of finance with which the federal government was involved are reviewed. Questions are raised regarding how government will shift money to state and local levels to support programs in which local districts have little interest and how old legislation is to be regarded. Educators are urged to continue to pressure for needs of educational systems. (0 references)

State Issues

Alexander, Kern. "Educational Fiscal Policy and Judicial Deference." Educational Administration Quarterly, Vol 10, 1982, pp. 131-149.

Court cases on racial segregation in schools, educational opportunity for the handicapped, bilingual education, and the separation of church and state are discussed. The author concludes that failure of the courts to assert boldly their prerogatives generally results in harm to public education. Non-assertion may result in denial of educational opportunity to an individual child and concomitantly lend itself to a diminution of fiscal resources for education. Where the courts have refused to defer, educational opportunity has expanded as in the desegregation cases. Similarly, decisions expanding the education horizons for handicapped, bilingual, and economically deprived children have sparked public financial commitments for many children who would never have received educational services without such intervention. Further, drastic modifications in the structure of the free public schools could come about if courts stand aside and allow religious interests to divide and partition public revenues for their respective sectarian purposes. (68 references)

Anderson, Bill. "Don't Tell This Little California System that Proposition 13 Hasn't Hurt." American School Board Journal, April 1980. Vol 167, pp. 40-41, 36.

Anderson described the impact of California's Proposition 13 on the finances of one California school district in the areas of class size, field experiences for students, summer school, school supplies and textbooks, equipment, staff, and management. (0 references)

Berke, Joel S. "Should Financial Support of Public Schools be Assumed Completely By States?" Educational Evaluation and Policy Analysis, January-February 1980, 3, 84-86.

Berke takes an affirmative position on complete state financing of public schools: inequities with current systems are discussed, as well as advantages of state support. The advantages stated are a broader and more reliable revenue base, equal educational opportunity, and revitalization of local influence in education. (5 references)

Calvin, Allen D. and Keen, Patricia. "Community Foundations for Public Schools,: Phi Delta Kappan, October 1982, 126-127.

Tax support is no longer adequate to fund public schools if they are to provide enrichment experiences to the children. Three community foundations have been established to provide funding in the past ten years in Dallas, Oakland, and San Francisco. The San Francisco project was funded by S. H. Cowell Foundation and it began in 1979. It received tax exempt status from the state and was therefore enabled to receive tax-exempt contributions. The group solicited advice from the community, the local university, business leaders and teacher-initiated programs at the local school level. To date this has been enormously successful. (2 references)

Collins, John and Lucove, Jeffery S. "Proposition 2 1/2: Lessons from Massachusetts." Educational Leadership, January 1982. Vol. 39, pp. 246-249.

The authors summarized some ways Massachusetts schools have trimmed their budgets in response to Proposition 2 1/2 and offered suggestions concerning how other schools or districts could (1) involve as many interested groups as time allows; (2) review current decision-making processes; (3) develop a system of goals and priorities that can be used to guide decision-makers; (4) develop and refine the ability to obtain information from the staff who spend the money or use the resources;(5) develop staff with group process, problem solving, and conflict resolution skills; (6) create clear job descriptions and develop staff evaluation systems; and (7) study "Management Time: Who's Got the Monkey?" (1 reference)

Guthrie, James W. "Should Financial Support of Public Schools be Assumed Completely by States?" Educational Evaluation and Policy Analysis, January-February 1980, Vol 3, pp. 86-87.

Guthrie has taken a negative position on complete state funding of public schools. The major premise is that abandonment of property tax revenues for other measures of funding open the schools to economic risk. Schools could become "political footballs" on the state level with each election. Loss of local loyalty, loss of local autonomy, and public alienation are discussed. (5 references)

Jones, Mike M. "Avoid Financial Ruin." The American School Board Journal, December 1981, Vol 168, pp. 40-41.

In 1975 newly appointed superintendent to the school district of Waycross, Georgia, found that the district was in debt $2.8 million out of a total budget of $7 million.

A 5-year plan was initiated to retire the debt and decrease the millage. The school district spending: reviewed school system programs and pupil-teacher ratio; required non-school groups who used the school buildings to contribute to the cost; closed out federally funded programs that cost the school district money; established new purchasing procedure; and handled their money more carefully. (0 references)

Kellom, Dr. David B. MASB's Ad Hoc School Finance Committee Reports Its Criteria for Public School Funding. Michigan School Board Journal, February 1982, Vol 28, pp. 12-14.

A picture is presented of the reduced State of Michigan expenditures from 41% to 32% of state income for education. Specific recommendations in the form of resolutions were presented as guides in evaluating new and current legislative proposals. The areas included were property tax, taxation reform, support of public education, truth-in-taxation, and homestead tax credits. The criteria for state funding of K-12 public education stressed the state's responsibility to assure sufficient funding to maintain a sound basic program with necessary improvement and updating. (0 references)

Moore, Gary A. "Equity Effects of Higher Education Finance and Tuition Grants in New York State." Journal of Human Resources, Fall 1978, Vol. 13, pp. 482-501.

A 1973 Carnegie Commission study contained numerous recommendations for improving equity in postsecondary education finance, and the State of New York has implemented several of these recommendations. The redistributional effects of the state's programs for the State University of New York system are estimated. Some preliminary estimates of public-private enrollment effects are also provided. Over a period of time encompassing the financing policy modifications, the evidence suggested that low-income students have experienced some increased access to public higher education in the state and that private institutions have benefited from the narrowed public-private tuition differential resulting from the revised policies. The author concluded that the effects presented here should be viewed as preliminary estimates for New York, given the very recent implementation of most of the financing policies and the lack of completely reliable data. (30 references)

Morgan, Edward P. "The Effects of Proposition 2 1/2 in Massachussetts. Phi Delta Kappan, December 1982, 252-258.

The taxpayers in Massachusetts voted to limit the local property tax levy to 2 1/2% per year. The effects of this referendum caused substantial effects on local revenues. The school budget now competes with the budget of municipal departments for revenue. The cities bear more than their share of local revenue losses. Public school spending had become less equitable. Massive lay-offs, budget cuts, and services provided by public schools weakened the strength of public education. Until the fiscal pressure of Proposition 2 1/2 becomes acute, no tax reform to distribute the tax burden more equitably across the population will occur. (20 references)

Pipho, Chris. "Rich States, Poor States." Phi Delta Kappan, June 1981, pp. 722-723,

In the past three years since Proposition 13 was passed in California seventeen states have adopted statutory or constitutional limits on taxation or spending. Several states are mentioned and their problems are discussed.State support of education in Florida will rise from 65 to 70% to relieve the property tax. In Indiana state school spending remains about 5% behind inflation. In Iowa the governor reduced state spending by 46% across the board adversely effecting education. In Michigan executive orders have cut state aid to schools, however, in North Dakota the legislature has increased state aid support of education form 50% to 70%, approved full payments for Kindergarten, and added $37.7 million for school transportation. (0 references)

Reilly, James R. "How Much Textbook Aid is Allowed Private Schools?" New Jersey Education Association Review, May 1980, Vol. 53, p. 19.

The New Jersey school's practice of loaning textbooks to private schools is examined. The practice was ruled constitutional, with state reimbursement to individual school districts on a per capita basis. Local boards were prohibited from expending for private school textbooks funds other than those provided as state private school textbook aid. The New Jersey Education Association objected because the state was spending more under provisions of edict on private school textbooks than on those of the public schools. The effects of the state bill and methods of reimbursement by the state to local districts is discussed. (3 references)

Savage, David. "The Unanticipated Impact of Proposition 3." Educational Leadership, January 1982, Vol. 39, pp. 250-251.

Although California schools are experiencing cutbacks, the cause may be attributed to declining enrollment rather than Proposition 13. A less debatable result of Proposition 13 is greater state control of education's purse strings. (0 references)

Scheuer, Joan. "Levittown v. Nyquist: A Dual Challenge." Phi Delta Kappan, February 1979, pp. 432-435.

Scheuer discussed a lawsuit of 27 school districts challenging the state of New York on its failure to meet its obligation to give the school children an equal opportunity in education. The challenge was that New York's system of financing public education was unconstitutional. Judge Smith presided and his opinion was that in the more wealthier districts less state aid should be spent and in poorer districts greater amounts of aid need to be spent to equal the quality of education. (6 references)

Straus, Kathleen. "The State of Education and School Finance." Michigan School Board Journal, February 1983, Vol. 29, pp. 23-25.

The article discussed the current (1983) financial situation of education in Michigan. The dilemma facing Governor Blanchard, the huge deficits with their implications. The types of cuts that districts have undertaken to attempt to meet the fiscal emergency were summarized. Several current state practices were condemned, and the options for improvement that the state has currently considering were briefly explored. (0 references)

Webber, Robert A. "A Work Management System Helped The Fresno Public Schools Get a Lot More Done for a Lot Less Money." The American School Board Journal, June 1976, Vol 163, pp. 45-46.

A consulting firm was hired by the Fresno, California School District to help them develop a management program to help them with their financial problems with taxes where the needs were high in a low income community. The article discusses how the consulting firm, who has experience in governmental and private business, developed a plan that trimmed $800,000 from Fresno's annual budget in areas of transportation, maintenance, and operation. The steps illustrate how they applied a work management system to their custodial operations--and saved money are also discussed. (0 references)

White, Eileen. "Superintendents' Strategies Yield $3.5 Million." The Executive Educator, April 1980, pp. 32-33.

The article discussed the Mesa, Arizona Public School System, and the successful methods the superintendent, George N. Smith, used in 1980. He invested district funds which yielded $3.5 million "profit". The different types of cash accounts that the district has were reviewed, as well as the various investment options that are available that offer maximum growth for the school dollar. It is recognized that the Mesa system is in an unusual situation of projected continuing growth, but the fiscal principles used are ones that are just as applicable in school systems that are economically less fortunate. (0 references)

Non-Public Schools

Cronin, Joseph M. and Kenyon, Regan. "State Government, its Relationship to Private Schools." National Association of Secondary Principals Bulletin Bulletin, 1982, Vol. 66, pp. 18-32.

Some distinctions between public and private schools are described. State officials govern with the concepts that: (1) money raised by state and local taxes should go only to schools organized by and contained in that district; and, (2) every school should provide at least as safe an environment and as good a teaching staff as public schools. The ESEA signaled an end to the impasse and hostility between public and private schools. Supreme Court rulings had declared that it was constitutional to use public money for textbooks to private schools, that children in private schools could be reimbursed for transportation costs, and finally that programs to help the handicapped in private schools could utilize public funds. As they stand, private schools may actually help public schools due to the private schools helping in the education of handicapped students, and also in the fight to desegregate public school systems. They also can be invaluable in the youth correction services, inservice training, and as a base for a continued spirit of cooperation. (11 references)

Finn Jr., Chester E. "Public Service, Public Support, Public Accountability, National Association of Secondary Principals Bulletin Bulletin, March 1982, pp. 67-74.

The author supports funding for private education and lists reasons why the government should make the funds more equitable. The government should aid non-public schools for the same reasons it aids public schools, to provide particular educational services to particular categories of students deemed to need such services. Federal aid should be provided to equalize education opportunity for all who happens to favor non-public education without regards to socio-economic status. (0 references)

Flygare, Thomas J. "Schools and the Law Finally, A Partial Victory for Parochial Schools." Phi Delta Kappan, 1977, 59, 51-53.

Two years after the Meek v. Pittenger case was decided, a landmark Supreme Court decision was rendered. In an appeal from an Ohio case the Supreme Court ruled that it is constitutional to use public funds to subsidize: textbook loans to private schools, diagnostic and therapeutic clinical health services to private schools, and use of public school transportation facilities for the use of private schools for field trips. (6 references)

Hoffman, Earl. "Milestones on the Road to Parochiaid." National Association of Secondary Principals Bulletin Bulletin, 1974, Vol. 58, pp. 95-101.

Several factors have occurred since the turn of the century which have developed into current parochiaid funding. In 1968 and 1969, Rhode Island and Pennsylvania attempted to enact legislation to subsidize non-public schools. Both were struck down, but their roots were planted early and continue to grow. In the 1920's, Louisiana enacted laws allowing public funding for textbooks used in private schools. In 1936, New York passed legislation allowing public funding for transportation of students attending private schools. Then in 1965, Congress passed the Elementary and Secondary Education Act which required that all children share the benefits of any enacted program. Finally in 1969, Rhode Island passed an act allowing supplementation of teacher salaries under certain circumstances in private schools. (12 references)

Hollings, Ernest, and Packwood, Bob (Senators). "Tuition Tax Credit Debate The Case For and Against Tuition Tax Credits." National Association of Secondary Principals Bulletin Bulletin, 1981, Vol. 65, pp. 76-83.

Bob Packwood, advocated tax credits for parents of children attending private schools. Tax credit would favor the low and middle income families since the credit would not be large enough to benefit upper income families. Parents who elect to have their children utilize a private school should not be penalized through the tax system by paying for two schools. Competition with public schools would cause more of an awareness for public wants and needs. Ernest Hollings gave the opposite view of tuition tax credits. He argued that credits would benefit a select few at the expense of many. To maintain a full separation of church and state, Hollings stated that the government's attitude should be to leave the private schools alone. His final argument was supported by the fact that the Supreme Court has ruled a tuition tax credit scheme unconstitutional. (0 references)

James, Thomas. "Tuition Tax Credits and the Pains of Democracy." Phi Delta Kappan, 1982, pp. 606-609.

If tuition tax credits become law, it would undoubtedly cause a shift from public to private schools. This would in turn cause more of an input into the schools by a larger section of the population. These people then would have more input into the school which will then actually make private schools into public schools. In essence then, there would be a shift in population from public to private schools with a shift in money from public to private schools. This would in essence then decrease the ability to offer specialized curriculum as is now done. (0 references)

Nolte, M. Chester. "Public aid to religious schools: What the Supreme Court said - and didn't say." The American School Board Journal, 1978, Vol. 165, pp. 35,45.

The 1978 Supreme Court ruling of Wolman v. Valter brought up some valid and confusing questions. The Supreme Court is to follow three guidelines in assessing the true separation of church and state. The questions asked involve finding out if: (1) the law meets a valid secular purpose; (2) the law advances or inhibits religion; (3) the law creates excessive governmental entanglements with religion. In its recent ruling, the Supreme Court utilized these questions and ruled that it is constitutional to provide private schools with public funds to borrow books but not educational devices, provide dental services, help in the treatment of hearing or speech problems, administering standardized tests, but they did not find it constitutional to provide money for field trips because of possibility of helping to promote religion. (0 references)

Shanker, Albert. "Why Schools Exist. Public Service? Tax Credits?" National Association of Secondary Principals Bulletin Bulletin, 1982, Vol. 66, pp. 75-83.

Private schools do not help in desegregation since mainly white upper middle class students attend these schools. Public schools exist to ensure democracy. Tax credits will only cause a shift from public to private schools. Tuitions will increase because there will be an increase in the size of facilities needed. As students leave public schools others will follow and public schools will become a wasteland. Parents will stop saving money for college since it will go for the education of young people in the education of young people in secondary schools. (0 references)

Sparling, Virginia. "Tuition Tax Credits." Today's Education, 1981, Vol. 70, pp. 11-14.

The debates over tax credits to private schools continue. The debate still centers around a few basic ideals. The impact on public policy would be large since private schools are allowed to select and expel students at will. Public schools would have to deal with many more problem students. Only about 10% of the students would benefit since this is the amount of students in private schools. Of these that benefit, only families with higher incomes (25,000 and up) would have a significant tax credit since their tax base is large enough to use this as a credit. Finally, tax credits may not be constitutional according to the 1st amendment. (2 references)

Accountability

Bray III, Allen F. "Accountability In the Schools: Who Has The Responsibility And How Widely Is It Shared?" National Association of Secondary Principals Bulletin, Vol. 66, pp. 56-60.

Accountability of teaching has to do with a total effort and its results. The immediate responsibility rests with the individual, but the accountability of the teacher cannot be fulfilled unless the various support systems are in place and operating in an effective and relevant manner. The student should assume responsibility for his learning. Accountability must be a concerted effort on the part of teachers, administrators, school board members, parents, and students. (6 references)

Brown, Timothy, and Elliot, Peggy G. Individualized Instruction - A Model For Academic Accountability, National Association of Secondary Principals Bulletin, October 1978, Vol. 62.

The concept of individualized instructions as a means of holding students accountable for their learning is discussed. The basic concepts of individualized instruction are diagnosis; prescription and evaluation. The humanist core of individualized instruction maintains that caring about individual differences is a responsibility of educators. Failure of organization being more important than instruction, lack of parental support and the lack of well-qualified teachers. A positive by-products, however, is that some teachers learned to write better objectives. (0 references)

Byrne, Robert. "Capturing the Elusive Student: Putting Accountability Theory Into Attendance Practice." National Association of Secondary Principals Bulletin, Vol. 65, pp. 29-33.

Two educational strategies for improving student attendance are reviewed. One strategy is the "iceberg" concept: the belief that student reluctance to attend school is ultimately the responsibility of a school environment which impedes self-expression and openness. The other strategy is based on the law, which is intolerant of individual whims and demanding of compliance with regulations that include consistent attendance. In 1977 the attendance policy (law) was implemented by the Cinnaminson School District and the attendance had improved considerably. One year later the "iceberg" concept was implemented. The attendance also improved dramatically. However, the author concludes that "long-term solution in the case of attendance is one which permeates the entire educational program and the environment of the school where it is applied." (0 references)

Genck, Fredric. "Make Your School System Accountable." American School Board Journal, February 1982, 34.

This article lists five components of a sound program of accountability for a school. If the techniques are used effectively, a school might find that student learning improves, parents and public satisfaction with the school rises, and job performance increases on parts of teacher and administrator. The Components are to: determine if students are learning; determine how parents and teachers view the district performance and take action; scrutinize the budget to make sure funds are being spent efficiently; meet regularly with administrator and superintendent to evaluate existing programs; and, evaluate administrator and teacher regularly.

Goodlad, John I. "A Perspective On Accountability." Phi Delta Kappan, October 1975, pp. 108-112.

Six criteria are given to formulate state-wide accountability goals. Accountability as a means of educational change and improvement, at best, ignores the change and improvement of education. Accountability has a small chance of achieving its purpose. Teachers as much as others in the accountability system want to improve schools. (20 references)

House, Ernest R., and Rivers, Wendell, and Stufflebeam, Daniel L. "An Assessment Of The Michigan Accountability System." Phi Delta Kappan, June 1974, Vol.55, pp. 663-669.

A six-step accountability model and positive aspects of accountability are described. The authors believe that accountability should be practiced at every level. Though the authors find the ideas generally good, they do find fault with some areas such accountability ideas generally good, they do take issue with some areas such as the Chapter 3 Program, which ties money to test scores. The authors tend to feel that accountability could be harmful to education in Michigan. They believe that the use of test scores to evaluate teachers is incorrect, and that there are many factors which influence learning that are not controlled by teachers. Political pressure demanding educational reform has created this program which is lacking thoughtful control, they coined as a "giant snowball rolling downhill." (5 references)

Kimpston, Richard D. "A Dilemma for Principal - Accountability and Demands on Staff." National Association of Secondary Principals Bulletin Bulletin, Vol. 62, October 1978, pp. 35-40.

Avenues to appropriately establish the process for an accountability program. The emphasis was on total professional staff participation and leadership, the formulation of goals district and subject area and the implementation of a reporting system. To be successful, staff members must relate to school district goals when planning, be explicit in planning, think of the school as a system and design a process for planning, involve prospective teachers in practical planning activities. Students are encouraged to participate in planning activities. (2 references)

Kowalski, Theodore J. "Why Your Board Needs Self-Evaluation." The American School Board Journal, 1981, 21-22.

An evaluation system of the school board can be invaluable not only to the board, but also to the community it serves. Few boards are willing to accept this criticism; However, an evolution system can be outstanding in providing the following: (1) identifying and clarifying the boards purpose; (2) identifying strengths and weaknesses; (3) assessing success and failure; (4) informing the public; (5) promoting the concept of accountability; (6) avoiding abuses of power; (7) ensuring compliance with ethical standards and regulations; (8) enhancing the understanding of the purpose of evaluation; (9) providing a framework for the future. Input could be both internal (from school employees) and external (from school parents). (0 references)

Lagana, Joseph F. "A Humanistic Approach to Accountability. A Paradox." National Association of Secondary School Principals Bulletin, Vol. 62 October 1978, 25-34.

The management concept of accountability and the philosophical belief of humanism are not contradictory. It is possible to combine the two concepts into something that is manageable, workable, compatible, meaningful, and productive. A climate inventory and profile scale are offered as means of assessing the climate and relating it to the paradox of humanism as an approach to accountability. The instrument is a means of at least providing a way of opening up communication for those affected by the leader's behavior and attitude. Guidelines for successfully learning about and living with the paradox of a humanistic approach to accountability are also provided in this article. (5 references)

Ornstein, Allan C., and Talmage, Harriet. "The Promise and Politics of Accountability." National Association of Secondary Principals Bulletin, March 1974, 58, 11-19.

Numerous people have impacts on student learning, and they, too must be accountable if we are going to employ a constructive model. Those accountable include teachers, administrators, parents, community residents, school board members, taxpayers, government officials, business representatives, and the students. Accountability implies that the schools know how students learn. The difficulty is that we have several competing ideas about learning that introduce further difficulty in relating learning to accountability. The authors conclude that political and economic motives need to be put aside so that educators can concentrate on the welfare of children. The importance of research, not rhetoric should be advocated. We must provide a forum that permits educators to fully understand issues such as the concept of accountability before advocating any ideas as one certain cure-all.
(0 references)

Pullin, Diane. "Minimum Competency Testing and the Demand For Accountability." Phi Delta Kappan, September 1981, pp. 20-22.

In Florida many problems arose because of Florida's implementing minimum competency test in order to grant the high school diploma. Those concerns were: (1) Black students were failing the test at a rate of ten times higher than whites thus inferring racial discrimination either in the test or the education of those youths; (2) there was no consistency of curriculum from elementary to secondary that was matched to the test; (3) one single test score determined the economic fate of many youngsters and that only several behaviors were measured. Minimum competency testing will narrow the curriculum which is evidenced in European nations where much time and energy is geared toward preparing for the "test". The author stated the unsoundness of awarding a diploma for passing a test that measures only a portion of the broad range of materials that constitute a sound curriculum over twelve years of schooling. (11 references)

Roper, Dwight, and Roper, Susan. "The Accountable School: Elective Course, Competition, and Cost Effectiveness." Phi Delta Kappan, March 1979, 60, pp. 527-528.

The authors believe that since the schools are faced with finance problems the best way out of the situation is to retain only those courses that attract students. The increase of competition will result in strengthening the entire program. The now required subjects should be placed in the elective system. This system would not guarantee full employment or less poverty, but it would guarantee to students and parents the right to cost effective competition and curriculum by choice. (1 reference)

Seely, David S. "Reducing the Confrontation Over Teacher Accountability." Phi Delta Kappan, December 1979, 61, pp. 248-251.

The link between student accountability and teacher accountability is no doubt what makes educators fearful about the competency movement. Four topics discussed relating to teacher accountability were recruitment, better school principals, more help for classroom teachers, and sharing the responsibility for education. The author believed too much reliance is placed on the professional establishment and in order for education to be successful, the teachers, administrators, and the parents need to cooperate with one another. (0 references)

Sergiovanni, Thomas. "Financial Incentives and Teachers Accountability: Are We Paying For The Wrong Thing?" Education Administrative Quarterly, Vol. 11, Spring 1975, pp. 112-115.

The article is a response to an article by Bruno and Nottingham, "Linking Financial Incentives To Teacher Accountability in School Districts". Financial incentives to teachers are linked to pupil gains as measured by the Cooperative Primary Reading Test. Is it really the teacher or team who is responsible or was that skill gained in earlier grades. In the Scanlan Plan a team of teachers is awarded a supplementary bonus if 95% of the students responsible to the team reach the 10 month gain ideal. Would it be better to teach toward precise goals thereby setting up precise recall-comprehension models for students to modify the accountability demands? Or is it possible to be less precise goal wise but more accurate concerning the skills and enjoyment of reading thereby hurting the teams financial compensation. It would seem that this financial plan tied to accountability would lessen ones ownership, proactiveness, etc. Teachers would become pawns reactors, followers of direction, and drones. (2 references)

Stow, Shirley B., and Sweeny, Jim. "Developing a Teacher Performance Evaluation System." Educational Leadership, April 1981, Vol. 38, pp. 538-541.

A comprehensive three-year planning process for a teacher performance evaluation system is described. In year one the documents are developed; in year two they are field-tested; and, in year three the system is implemented. The sequential steps for developing a teacher performance evaluation system include (1) selecting a steering committee; (2) defining the philosophic premises; (3) determining performance areas and criteria; (4) selecting the operational procedures; (5) identifying the forms and records; (6) planning the test-and-try; (7) revising/refining the system; (8) recommending to the board of education; and, (9) implementing the system. (3 references)

Weischadle, David E. "Why You'll Be Hearing More About 'Zero-Base Budgeting,' And What You Should Know About It." American School Board Journal, September 1977, 33-34.

One cardinal principle of zero-base budgeting is that nothing is sacred. Every program, if it is to receive continued funding, must be justified anew each time the budgeting process begins. The budgeting method may have a beneficial effect and/or a problematic effect on schools. An obvious advantage is that any budget increase must be justified. The demand for extensive orientation and training is one of the problems for the adoption of Zero-base budgeting. Therefore, four crucial matters should be considered before embracing the concept: paperwork; administration; simplicity; and, expectations. (0 references)